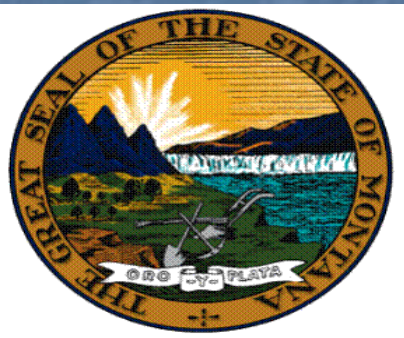


# Mission Un-Accomplished

Records and Information Management  
Montana IT Conference  
December 4, 2009



Secretary of State  
Linda McCulloch

# Welcome!

- Overview and Objectives
  - Montana IT Conference 2009



- Importance of Records and Information Management (RIM)

# Records and Information Management

- Today's government business is largely conducted within applications and systems, internally or via web sites.
- Technology vs. User Intervention
  - processes and manual procedures
- RIM requirements are trending with eCommerce and eGovernment.

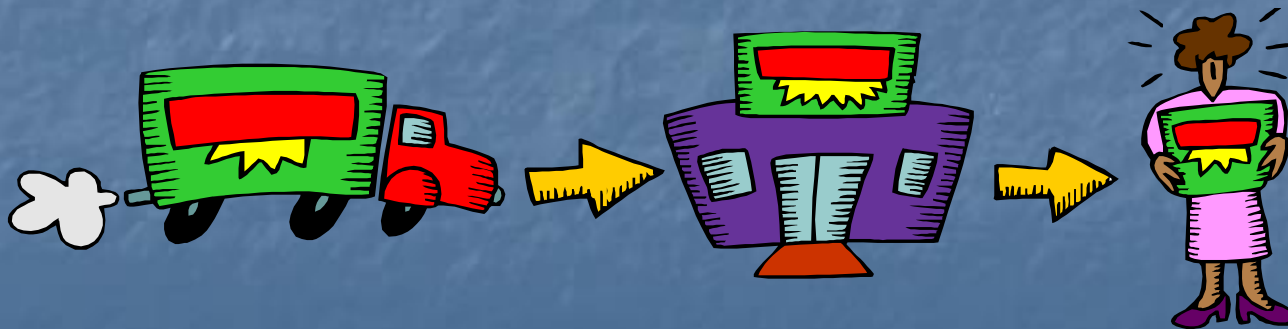
# Records and Information Management

- Change for RIM requirements is inevitable.
- RIM requirements need to be included a project's costs.
- RIM controls need to be included during the systems' design and implementation.
- Standards and policies need to be adopted to ensure agency compliance and efficiency.



# Records and Information Management

- RIM functionality is split between service delivery and business functions.
- RIM supports new concepts, practices and terminology for managing public records.
- RIM has enterprise effect on state government.



# Let's Talk Government

- Efficiency & Energy Sustainability and Savings
- Security Risks and Programs
- Service-Oriented Architecture
- Project Management
- Service Management
- Shared Services



# Let's Talk Government



- App Delivery/User Permissions
- Web 2.0/Social Networking Dangers
- Network Services/Secure Wireless
- Identity Management
- Leveraging IT Boundaries
- Procurement/Contract Management
- Business Continuity
- Customer Translation



# RIM and Technology

## ■ **Project Management**

- RIM is a workflow process
- Identification of inputs and outputs
  - Forms, Reports, Images, Data
- Retention and disposal application

## ■ **Shared Services**

- Health records portability (HIPAA)
- Courts systems (Data Broker)
- Digital repositories (PeDALS/SLAs)



# RIM and Technology

- **Web 2.0 Technologies**

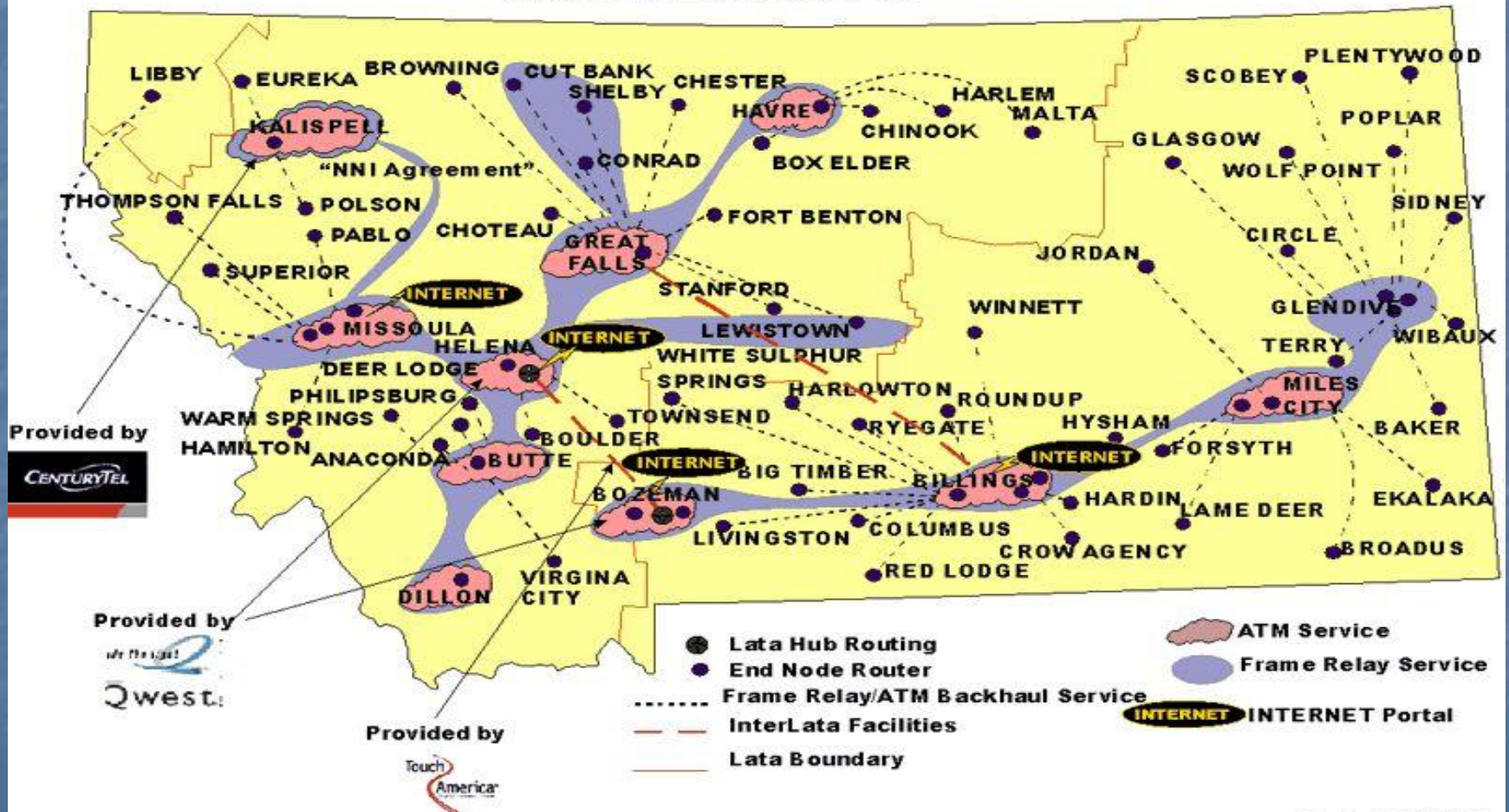
- Innovation and responsiveness to customer
- Simplify communication and collaboration
- Secure, reliable and manageable (is it?)

- **Business Continuity**

- Public safety first
- Public and health services
- Legal and financial obligations or rights of government or its citizens (SEFs)

# State of MT Network

## SummitNet II



Revised 03/02/04

# SOS-RIM Recommendation

- If 100% of us, create or receive 85% public records on average, there is A LOT of public records and data to be properly managed.
- Think RIM! Educate yourself and others.
- Develop legally compliant retention programs; including retention schedules, policies and procedures.
- Comply with statutes and regulations regarding legal and financial retention of business records.



# Stump The Speaker

- Take the Challenge!
- Attendees participation encouraged
- Declare a project, process, task or assignment that doesn't interrelate with RIM?
- Must be government specific
- Win fantastic prizes!



# RIM Resources

- Secretary of State Records and Information Management  
<http://www.sos.mt.gov/Records/index.asp>
- Department of Administration-Emergency  
<http://doa.mt.gov/emergency/default.mcpix>
- DOA Security and Continuity Services Bureau  
<http://continuity.mine.mt.gov/default.mcpix>
- ARMA (National RIM Association)  
<http://www.arma.org/>
- US DoD 5015 Standards - Design Criteria Standard for Electronic Records Management Software Applications  
<http://www.defenselink.mil/webmasters/policy/dodd50152p.pdf>
- Nat'l Institute of Standards and Technology  
<http://csrc.nist.gov/publications/PubsSPs.html>
- Lessons Learned Information Sharing  
<https://www.llis.dhs.gov/index.do>

# Thank You!

- Questions?
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- Happy Holidays!